FAS REPORT

United States
Department of
Agriculture
Foreign
Agricultural
Service
Washington, D.C. 20250

WEEKLY ROUNDUP OF WORLD PRODUCTION AND TRADE WR-45-81

WASHINGTON, Nov. 12--The Foreign Agricultural Service of the U.S. Department of Agriculture today announced the following recent developments in world agriculture and trade.

GRAIN AND FEED

CANADA's Wheat Board recently announced an increase in the Polish credit limit to facilitate continued Polish imports of Canadian grain. Under the terms of the Canadian-Polish long-term agreement, Poland is expected to purchase 1 to 1.5 million tons of Canadian grain annually through 1982. Wheat Board Minister Argue said that Canada has undertaken to continue providing the quantities of grain specified in the long-term agreement, including the necessary financing. This level of Canadian shipments would supply up to 20 percent of Poland's total annual grain import requirements during 1981/82.

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BURMA's rice production is expected to set another record as a result of favorable growing conditions, expanded area of high-yield varieties and increased fertilizer use. Field reports indicate a rice crop approximately 8 percent above last year's record level of 12.5 million tons. Such a large crop will force rice into export channels at a time when world demand will be particularly weak.

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ARGENTINA's Grain Board recently announced a reference, or support price, for new crop wheat. At the current commercial exchange rate, this amounts to $200 per ton at the farm gate, less transportation to port facilities. The reference price system requires the Grain Board to purchase all wheat offered at this price. According to public comments by ministry officials, the reference price was fixed at this level to insure sufficient domestic supplies from this year's drought-stricken crop. In the past, Argentina occasionally has oversold wheat into export and then imported later in the season. The recent decision to keep export registrations open, combined with a reduced wheat crop, required some attempt by the Grain Board to slow possible export activity.

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INDIA's recently released official food grain estimates for its 1980/81 crop year. Wheat production (spring 1981 harvest), at a record 36.5 million tons, is up 2.5 million tons from the October USDA estimate and sharply above the preceding year's 31.8-million-ton crop. Rice outturn (mostly harvested during late 1980) reached 53.2 million tons (milled basis), up 26 percent over the preceding year, although harvested area declined slightly. The wheat production outlook for India's 1981/82 crop year (spring 1982 harvest) appears favorable in light of recent rains in major wheat producing areas.

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JAPAN's Ministry of Agriculture, Fisheries and Forestry (MAFF) has released its latest estimate of the 1981 rice crop. Planted acreage for 1981 is estimated at 2.3 million hectares, down roughly 5 percent from last year's level. Outturn, however, is estimated at 12.9 million tons (rough basis), an increase of 6 percent, reflecting increased yields.

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In SPAIN, dry conditions are affecting grain production for the second consecutive year. Fall rains, which normally begin in September, have failed to materialize, causing delays in winter grains sowing. As a result, some farmers may shift from winter to spring grains and oilseeds which have lower yields and require the application of more costly inputs. If significant precipitation is not received soon, Spain will likely experience another poor grain crop, requiring increased imports in light of sharply reduced stocks.

DAIRY, LIVESTOCK AND POULTRY

In the NETHERLANDS, poultry production during 1981 is expected to increase only 5 percent, rather than the 8 percent previously forecast. With about three-fourths of its production destined for the export market, prospects for Dutch poultry output closely follow the export market.

During the first eight months of 1981, poultry meat exports were up 25 percent, largely because of stronger Soviet and Middle East markets and a dollar/guilder exchange ratio that favored Dutch exports. However, recent strengthening of the guilder relative to the dollar has hurt export prospects, while further increases in costs have cut production levels. Exports for all of 1981 are now seen rising 15 percent. Lower domestic consumption due to high prices and slow income growth, plus some stock reductions, also are facilitating the higher export level.

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In AUSTRALIA and NEW ZEALAND, beef and veal production is expected to fall again in 1982 for the fifth consecutive year. Current conditions indicate that production in the two countries combined may be 3 percent below the 1981 level of 1.9 million tons.

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Low world beef prices and unfavorable weather in Australia are the primary reasons for the low 1982 production that is estimated at only 68 percent of the 1977 and 1978 records of 2.7 million tons. An increase in U.S. exports would probably more than offset a decline in Australia and New Zealand.

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BRAZIL's broiler production continues to expand in 1981 with output forecasted at 1,325,000 tons, up 6 percent from 1980. The outlook for 1982 is for continued rapid expansion of probably another 6 percent. Strong export demand to the Middle East and the Soviet Union's is one of the primary stimulants.

HORTICULTURAL AND TROPICAL PRODUCTS

In POLAND, potato production is estimated at 45 million tons, up 70 percent from the extremely poor 1980 harvest, according to a report by the U.S. agricultural counselor in Warsaw. Shortages of seed potatoes, fertilizer, herbicides, pesticides, and machinery and spare parts were offset by ideal weather throughout the entire growing season and increased use of hand labor. The largest portion of the crop will be used for swine feed. The reduced 1980 crop resulted in an 11-percent reduction in hog numbers during 1980. Because of the good 1981 potato crop, feeder pig prices are reported to be almost double year earlier levels and swine numbers are expected to be higher by the end of 1981.

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In the SOVIET UNION, the 1981 potato crop is forecast at between 65 million and 75 million tons, compared with the 1981 plan of 90 million tons, according to a report by the U.S. agricultural counselor in Moscow. The crop could be below 1980's disasterous crop of 67 million tons and defintely below the 1976-80 average of 82.6 million tons. The extreme drought in European USSR is the major factor in this year's expected poor harvest. Hot weather in June and July in many areas of the Ukraine and RSFSR (which account for nearly three-fourths of the total crop), likely had a severe impact on tuber development.

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In major sugar beet regions of FRANCE, BELGIUM, WEST GERMANY and ITALY, wet conditions during October and early November have caused delays in lifting sugar beets in many areas, particularly in northeast France. Harvest delays leave the crop vulnerable to frost damage and could cut current prospects for a bumper sugar output from these key producing countries.

Combined outstanding sugar beet crops in these countries currently are forecast to produce 11.6 million tons of sugar or about 80 percent of the European Community's (EC's) sugar output and 12 percent of the world's 1981/82 sugar production now estimated at 95.8 million tons.

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BRAZIL's major coffee producing states of Parana, Sao Paulo and Minas Gerais--hit by frosts in July with subsequent prolonged dry weather--have recently received beneficial rains, which are critical to the 1982/83 coffee crop's development. Reports indicate that the recent rains have brought forth good flowering in areas which escaped the July frost and better than expected flowering on trees which were only lightly damaged by the frost. However, trees severely damaged by the July frost, as expected, have not flowered.

USDA estimated in late August that, due to the frost, Brazil's total 1982/83 coffee production potential would be reduced by 40 to 45 percent, from 27 million to 30.5 million bags of 60 kilograms to 15 million to 18 million bags. As stated in August, growing conditions during the flowering and fruit set stage (Sept.-Dec.) will be critical to the 1982/83 crop's development.

To accurately guage the crop's development and level of cultural practices, the office of the U.S. agricultural officer in Rio de Janerio will conduct extensive field surveys in January after flowering and fruit set, and again in April before the 1982/83 harvest.

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CUBA was hit Nov. 5 and 6 by Hurricane Katrina packing winds of 85 miles per hour, plus heavy rains as it slammed into the southern coast. The hurricane crossed the island in an east, northeast direction, roughly between the towns of Sancti Spiritus and Camaguey. While its strength diminished somewhat as the hurricane moved over land, the force of the winds would likely have caused significant breakage of sugarcane and damage to citrus groves. This region of Cuba is estimated to have between 10 to 15 percent of the country's sugar acreage and accounts for about 15 percent of citrus production, mainly Valencia oranges, which are harvested between December and May. Cuba's sugarcane harvest begins in November and runs through May.

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BRAZIL, the world's largest sugar producer, is expected to produce 8.5 million tons of sugar from an estimated 100.4 million tons of harvested cane. This represents increases of 5 percent in sugar production and 4 percent in cane tonnage from the preceding year. The record 1981/82 sugar productin is slightly below the government's goal of 8.6 million tons mainly owing to low yields caused from very dry weather in the state of Rio de Janerio. Current analysis indicates that the frost that hit the significant sugar-producing states of Sao Paulo, Parana, and Minas Gerais last July did little damage to the sugar content of subsequently harvested cane since the frost was followed by beneficial dry weather. Also, larger than previously estimated plantings in the state of Sao Paulo more than offset losses from the frost.

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In COLOMBIA, Black Sigatoka disease, an extremely virulent strain of leaf spot, was detected on Oct. 26, in Uraba, the major banana producing area in the northwest portion of the country. Approximately 83 percent of the area planted to bananas for export is located in Uraba.

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In the MEDITERRANEAN BASIN, the 1981/82 citrus crops are forecast to equal or exceed the volume harvested a year earlier. Output of lemons, oranges and tangerine-type fruits is expected to be off 1 to 5 percent in Italy, which experienced a shortage of both rainfall and irrigation water. Spain, with unseasonable weather conditions throughout the entire growing period, as well as disease problems, is projected to harvest substantially smaller crops of oranges and tangerines.

Current estimates for citrus production in the Mediterranean Basin for the 1980/81 and 1981/82 seasons are as follows in 1,000 tons.

	CYPRUS	ITALY	MOROCCO	SPAIN
Oranges:				
1980/81	122.6	1,810.0	685.0	1,693.0
1981/82	130.6	1,780.0	717.0	1,434.0
Tangerine-type fruits:				
1980/81	1.2	315.0	280.0	901.0
1981/82	1.7	300.0	280.0	737.0
Lemons:				
1980/81	36.0	725.0	2.0	342.0
1981/82	40.6	720.0	3.0	427.0
Grapefruit:				
1980/81	--	--	10.0	9.0
1981/82	--	--	10.0	9.0

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In SOUTH AFRICA, the avocado industry is still expanding. New plantings in the Transvaal, the main growing area, continue at a brisk pace. Modest plantings also have been made in the frost-free areas of Natal. Further growth is expected in both regions over the next several years, as many young trees come into bearing and the increasingly mature trees give higher yields.

Between 1976 and 1980, bearing area and production rose 35 and 18 percent, respectively. Although bearing area expanded to 5,533 hectares in 1981, the upward trend in production was broken as excessive rains adversely affected the 1981 crop yields and output reached only 19,000 tons. The alternate bearing cycle also was a factor in the decline. Barring inclement weather during the 1982 season, South Africa's avocado output is currently projected to exceed the record 1980 outturn. A five-year comparsion of avocado area and production is as follows in hectares.

	1976	1980
Bearing area	3,840	5,195
Non-bearing area	1,667	1,239
Total	5,507	6,434
Production	18,298	21,625

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COTTON

PERU has reduced the export tax on cotton in an effort to encourage exports from 12.5 percent of f.o.b. value to 6 percent, effective Oct. 7. A further reduction to 4 percent is scheduled for Jan. 1, 1983.

TOBACCO

In YUGOSLAVIA, the Association of Tobacco Industry estimates the 1981 tobacco leaf production at 70,000 tons, up nearly 23 percent from the 1980 level. Favorable weather, with abundant moisture particularly in Virigina-type growing areas, and a 12-percent rise in planted area accounts for the increase. The Association's forecast for 1982 is for a 9-percent increase in area and a 4-percent increase in production.

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The SOVIET UNION's tobacco industry continues to be plagued with production problems. According to the U.S. agricultural counselor in Moscow, 1981 tobacco production is expected to reach only 290,000 tons, compared with planned production of 348,000 tons. In order to meet the demand for tobacco products in 1980, imports of leaf tobacco increased 25 percent to 83,000 tons and imports of cigarettes rose slightly. The 1981 imports are expected to continue at a similar pace.

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In INDIA, the total tobacco crop is estimated at 45,000 tons for 1981, according to the U.S. agricultural counselor in New Delhi. This is marginally higher than the preceding year. Flue-cured tobacco production is estimated at 125,000 tons, about 22,000 tons more than in 1980. Current prospects for 1982 are more favorable than 1981 due to generally good weather conditions in the main producing areas, better prices realized by farmers in 1981 and indications of continuing good export demand. Total exports for 1981 are expected to be up 23 percent to 90,000 tons.

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Total tobacco production in CANADA for 1981 is estimated at 110,000 tons, up marginally from 1980. Excessive moisture delayed the Ontario harvest, which accounts for about 90 percent of total production. Yields and quality for both flue-cured and burely are reported good.

FISCAL 1981 U.S. AGRICULTURAL IMPORTS

Total U.S. agricultural imports for fiscal 1981 (Oct.-Sept.) were valued at $17.2 billion, largely unchanged from last year's $17.3-billion total. During September, the last month of the fiscal year, imports rose to $1.28 billion--3 percent more than the same month a year ago.

The leveling off in U.S. agricultural imports in fiscal 1981 is due mainly to decreases in major U.S. import items such as coffee, cocoa, coconut oil, rubber, beef and cattle. Together, these commodities account for over 40 percent of total U.S. agricultural imports. Decreases in outlays for these products compensated for increases in most other agricultural imports.

U.S. AGRICULTURAL IMPORTS FROM ALL SOURCES
OCTOBER 1979 - SEPTEMBER 1981

COMMODITIES	UNIT	CUMULATIVE TO DATE: QUANTITY 10/79-09/80	10/80-09/81	% DIF	VALUE 10/79-09/80	10/80-09/81	% DIF	CURRENT MONTH (SEPTEMBER): QUANTITY 1980	1981	% DIF	VALUE 1980	1981	% DIF
GRAINS AND FEEDS													
WHEAT & PRODUCTS....	MT	142,190	152,589	+7	168,836	185,407	+10	12,567	13,622	+8	15,706	17,295	+10
BARLEY & MALT.......	MT	224,288	173,553	-23	41,884	39,370	-6	18,954	11,970	-37	4,044	2,560	-37
OTH COARSE GRAINS 1/	MT	43,268	42,323	-2	9,697	10,406	+7	7,030	3,176	-55	1,539	694	-55
PULSES..............	MT	22,898	37,737	+65	16,067	26,115	+63	2,693	1,801	-33	1,961	1,212	-38
OTHER...............	XXX				132,306	176,571	+33				11,857	15,934	+34
TOTAL............	XXX				368,791	437,869	+19				35,108	37,694	+7
OILSEEDS & PRODUCTS													
OILSEEDS............	MT	76,419	178,337	+133	45,201	80,352	+78	4,565	14,100	+209	2,963	6,102	+106
COCONUT OIL.........	MT	367,473	508,783	+38	292,343	277,014	-5	25,620	38,410	+50	16,109	20,814	+29
PALM OIL............	MT	96,290	146,836	+53	56,509	71,339	+26	4,589	11,986	+161	2,282	5,979	+162
OTHER VEG. OILS.....	MT	171,882	161,532	-6	189,532	152,031	-20	13,210	11,878	-10	13,142	11,346	-14
OTHER...............	MT	47,540	200,413	+322	30,741	326,581	+962	2,877	7,843	+173	2,007	3,845	+92
TOTAL............	MT	759,605	1195,941	+57	614,326	907,318	+48	50,862	84,217	+66	36,502	48,086	+32
SEEDS...............	MT	30,380	33,954	+12	51,908	60,791	+17	5,041	1,676	-67	4,389	3,405	-22
COTTON,LINTERS,SILK...	MT	22,106	12,804	-42	15,353	18,490	+20	1,397	555	-60	1,317	842	-36
TOBACCO UNMFG.													
CIGARETTE LEAF......	MT	88,269	111,944	+27	254,896	298,565	+17	8,057	10,299	+28	23,774	30,799	+30
CIGAR LEAF..........	MT	2,841	3,640	+28	15,337	16,858	+10	408	198	-52	1,359	1,181	-12
SCRAP & STEMS.......	MT	78,365	44,678	-43	131,582	50,913	-61	3,847	4,187	+9	5,745	5,123	-11
TOTAL............	MT	169,476	160,262	-5	401,815	366,336	-9	12,313	14,684	+19	30,870	37,104	+20
POULTRY PRODUCTS													
FEATHERS & DOWN.....	MT	6,584	8,350	+27	57,987	77,646	+34	520	747	+44	4,096	6,859	+67
POULTRY MEAT........	MT	459	656	+43	2,271	2,947	+30	51	27	-47	150	212	+41
EGGS & PRODUCTS.....	XXX				5,136	5,969	+16				543	216	-60
OTHER...............	XXX				3,177	4,202	+32				370	256	-31
TOTAL............	XXX				68,571	90,764	+32				5,160	7,543	+46

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DAIRY PRODUCTS													
CHEESE, QUOTA	MT	89,887	96,394	+8	241,104	272,297	+13	10,062	8,397	-17	26,192	24,399	-7
CHEESE, NON-QUOTA	MT	14,323	16,172	+13	48,221	57,432	+19	1,236	1,585	+28	4,319	5,674	+31
CASEIN	MT	69,591	59,188	-15	158,373	172,719	+9	3,548	4,612	+30	9,990	13,650	+37
OTHER	XXX				12,677	19,776	+56				407	559	+37
TOTAL	XXX				460,375	522,224	+13				40,908	44,283	+8
LIVESTOCK & PRODS.													
WOOL	MT	24,471	31,475	+29	99,252	135,931	+37	1,852	1,661	-10	7,709	6,843	-11
MEAT	MT	911,602	904,646	-1	2,277,477	2,221,953	-2	60,310	81,490	+35	151,746	183,965	+21
BEEF AND VEAL	MT	694,736	668,651	-4	1,752,163	1,621,305	-7	43,845	64,157	+46	111,158	140,272	+26
PORK	MT	186,811	200,890	+8	454,364	508,837	+12	14,257	13,164	-8	35,705	32,228	-10
OTHER (EDIBLE)	MT	30,055	35,105	+17	70,950	91,811	+29	2,208	4,169	+89	4,883	11,465	+135
LIVE CATTLE	NO	889,832	682,635	-23	299,404	201,043	-33	23,674	29,157	+23	10,817	12,722	+18
OTHER LIVESTOCK	NO	265,786	192,431	-28	167,497	137,645	-18	19,499	10,611	-46	21,773	14,038	-36
HIDES & SKINS	XXX				92,304	96,333	+4				5,045	7,774	+54
FURSKINS	XXX				135,071	184,182	+36				14,439	13,408	-7
OTHER	XXX				143,023	160,901	+13				10,791	10,541	-2
TOTAL	XXX				3,214,027	3,137,988	-2				222,320	249,290	+12
HORTICULTURAL PROD.													
FRUIT	MT	3993,905	4552,880	+14	1047,895	1271,001	+21	340,920	352,393	+3	82,773	96,375	+16
FRESH	MT	2895,705	2966,850	+2	598,352	704,153	+18	248,351	210,324	-15	43,954	47,824	+9
PREP. & PRES.	MT	384,619	340,259	-12	305,701	299,082	-2	37,926	28,672	-24	28,776	24,373	-15
JUICES	LIT	713,581	1245,761	+75	143,842	267,766	+86	54,643	113,397	+108	10,043	24,178	+141
VEGETABLES, FR/FZ	MT	985,915	993,495	+1	386,380	539,070	+40	33,234	29,548	-11	11,501	12,173	+6
VEG., PREP., PRES.	MT	220,821	265,078	+20	259,340	270,187	+4	14,811	20,032	+35	17,998	20,722	+15
TREE NUTS	XXX				227,302	243,160	+7				24,575	16,344	-33
WINE	LIT	383,194	413,505	+8	673,907	737,484	+9	36,439	33,707	-7	64,818	55,583	-14
OTHER ALCOHOLIC BEV.	LIT	545,107	619,130	+14	366,004	403,853	+10	50,222	57,348	+14	35,407	36,835	+4
NURSERY PRODUCTS	XXX				145,784	175,575	+20				19,612	25,038	+28
OTHER	XXX				217,865	242,573	+11				12,516	15,527	+24
TOTAL	XXX				3,324,478	3,982,904	+17				269,200	278,597	+3

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COMMODITIES	UNIT 1/	CUMULATIVE TO DATE QUANTITY 10/79-09/80	10/80-09/81	% DIF	VALUE 10/79-09/80	10/80-09/81	% DIF	CURRENT MONTH (SEPTEMBER) QUANTITY 1980	1981	% DIF	VALUE 1980	1981	% DIF
SUGAR & TROP. PRODS.													
SUGAR, RAW & REFINED	MT	4002,542	3808,083	-5	1,628,026	2,174,361	+34	295,142	390,069	+32	175,244	163,976	-6
SWEETENERS..........	MT	669,294	607,465	-9	215,051	242,509	+13	28,709	88,855	+209	13,695	31,615	+131
COCOA & PRODUCTS....	MT	316,261	431,652	+36	969,306	953,885	-2	20,939	36,157	+73	56,926	77,318	+36
COFFEE..............	MT	1150,856	1025,187	-11	4,494,121	3,078,810	-31	66,248	73,493	+11	233,065	187,425	-20
ESSENTIAL OILS......	MT	8,960	8,448	-6	126,697	101,598	-20	465	613	+32	9,204	7,494	-19
TEA.................	MT	86,390	85,700	--	132,844	132,232	--	5,384	5,990	+11	8,418	8,814	+5
SPICES..............	MT	110,937	129,675	+17	165,467	176,428	+7	8,668	7,637	-12	9,750	10,636	+9
FIBERS..............	MT	72,851	75,072	+3	52,325	45,642	-13	3,350	4,536	+35	3,107	3,588	+15
RUBBER & ALLIED GUMS	MT	629,013	627,259	--	834,432	767,260	-8	57,655	63,878	+11	75,626	71,638	-5
OTHER...............	XXX				137,884	120,670	-12				7,211	9,909	+37
TOTAL...............	XXX				8,756,154	7,793,394	-11				592,246	572,414	-3
GRAND TOTAL.........	XXX				17,275,798	17,218,077	--				1238,020	1279,258	+3

1/ INCLUDES BY-PRODUCTS. 2/ QUANTITY TOTALS ARE NOT MEANINGFUL SINCE UNITS OF MEASURE DIFFER.

SOURCE: U.S. CENSUS DATA (UNADJUSTED). NOTE: VALUE UNITS ARE IN THOUSANDS OF DOLLARS. LITER UNITS ARE IN THOUSAND OF UNITS.
--DENOTES LESS THAN 1 PERCENT CHANGE. *** DENOTES GREATER THAN 999 PERCENT CHANGE.

TRADE AND ECONOMIC INFORMATION DIVISION
TRADE AND MARKETING BRANCH, IAS, FAS, USDA

Rotterdam Prices and E.C. Import Levies:

Asking prices in U.S. dollars for imported grain and soybeans, c.i.f., Rotterdam, the Netherlands, compared with a week earlier and a year ago:

Item	Nov. 10, 1981		Change from previous week	A year ago
	$ per m. ton	$ per bu.	¢ per bu.	$ per m. ton
Wheat				
Canadian No. 1 CWRS-13.5%.....	1/	1/	1/	1/
U.S. No. 2 DNS/NS: 14%........	197.00	5.36	+7	226.00
U.S. No. 2 DHW/HW: 13.5%......	212.00	5.77	+38	228.00
U.S. No. 2 S.R.W..............	190.00	5.17	+14	226.00
U.S. No. 3 H.A.D..............	197.00	5.36	+5	304.00
Canadian No. 1 A: Durum.......	1/	1/	1/	1/
Feed grains:				
U.S. No. 3 Yellow Corn........	126.50	3.21	+1	174.50
U.S. No. 2 Sorghum 2/.........	136.00	3.45	-8	188.50
Feed Barley 3/................	147.50	3.21	+7	198.00
Soybeans:				
U.S. No. 2 Yellow.............	261.25	7.11	+12	353.75
Argentine 4/..................	1/	1/	1/	1/
U.S. 44% Soybean Meal (M.T.)..	231.50	--	+2.00 5/	335.00
EC Import Levies				
Wheat 6/......................	79.40	2.16	+23	74.20
Barley........................	83.50	1.82	+18	45.65
Corn..........................	107.10	2.72	+27	81.95
Sorghum.......................	93.85	2.38	+24	65.00

1/ Not available.
2/ Optional delivery: U.S. or Argentine Granifero Sorghum.
3/ Optional delivery: U.S. or Canadian Feed Barley
4/ Optional delivery: Brazil yellow.
5/ Dollars per metric ton.
6/ Durum has a special levy.

Note: Basis December delivery.

RECENT FOREIGN AGRICULTURE CIRCULARS

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